

CSC Adopted: October 2001 , CSC Revised: \_\_\_\_\_**Class Title: Benefits Specialist****BRIEF DESCRIPTION OF THE CLASSIFICATION:**

Interprets and applies benefit program policies and procedures to internal and external customers, program participants and benefits representatives. Provides technical and financial information to employees, retirees, departments, and other agencies.

**ESSENTIAL FUNCTIONS:**

*This information is intended to be descriptive of the key responsibilities of the classification. The following examples do not identify all duties performed by any single incumbent. Specific requirements of individual positions are described in the Job Description.*

Physical Strength Code		ESSENTIAL FUNCTIONS
1	S	Processes and reviews applications and address issues by ensuring that information is properly entered into the system, maintaining and updating computerized benefit records, reviewing a variety of insurance applications for accuracy, staying informed of changes to benefits programs, managing enrollment, cancellations, and payroll deductions for insurance, and determining the impact of a problem and assisting in the its resolution.
2	S	Provides assistance to customers by conferring with internal and external customers regarding benefit issues, serving as a liaison between employees and benefit providers, providing written and verbal reports to benefit providers, responding to inquiries of benefit participants, providers, and external customers in a timely manner, and making judgments concerning the administration of group information based on city, state and federal regulatory criteria.
3	S	Completes billing reconciliation's by analyzing accounting data related to receivables, payables, and month end financial reports, reconciling bank statements for auditing, preparing documentation for internal and external auditing purposes for the Department of Finance and the Auditor's Office, consulting with other departmental personnel and providers to resolve discrepancies for payroll deductions and provider payments, reviewing and editing providers' billing statements, processing payments in the financial system, forwarding checks to benefit providers, posting payroll deductions to ledgers, developing and maintaining spreadsheets for analysis of accounts, monitoring account transactions for accuracy and validity, and making recommendations for corrections to billings and payments.
4	S	Maintains records and completes documents by organizing, maintaining and updating benefit records, processing and forwarding documents to benefit providers, and completing forms to verify coverage for employees.
5	L	Coordinates open enrollment by assembling and distributing benefits packages, and participating in informational meetings and training sessions.
6	S	Facilitates New Employees Payroll and Benefits Orientation by answering inquiries regarding payroll and benefit issues, interpreting and explaining benefit policies and procedures and assisting in the verification and collection of payroll information for new hires.

CSC Adopted: October 2001 , CSC Revised: \_\_\_\_\_**CLASS REQUIREMENTS:**

<b>CLASS REQUIREMENTS</b>	
Formal Education / Knowledge	Work requires knowledge of a specific vocational, administrative, or technical nature which may be obtained with six months/one year of advanced study or training past the high school equivalency. Junior college, vocational, business, technical or correspondence schools are likely sources. Appropriate certification may be awarded upon satisfactory completion of advanced study or training.
Experience	One years experience in Accounting, Computer skills, Benefit Program procedures.
Certifications and Other Requirements	Valid Driver's License
Reading	Work requires the ability to read and assess applications to ensure completeness and accuracy. Must be able to read federal and state guidelines in order to interpret and apply policies and procedures.
Math	Work requires the ability to perform general math calculations such as addition, subtraction, multiplication and division.
Writing	Work requires the ability to write letters and correspondences.
Managerial	Managerial responsibilities include planning and assembling the distribution of benefit packages, scheduling training sessions, prioritizing and scheduling daily appointments and tasks, as well as providing guidance to departmental payroll clerks.
Budget Responsibility	N/A
Supervisory / Organizational Control	Work requires the occasional direction of helpers, assistants, seasonal employees, interns, or temporary employees.
Complexity	Work involves choices of action within limits set by standard practices and procedures. Professional judgment is required to apply the proper course of action.
Interpersonal / Human Relations Skills	Contacts others within the organization. These contacts may involve similar work units or departments within the City which may be involved in decision making or providing approval or decision making authority for purchases or projects. Working with various state and federal agencies may also be required. Vendors and suppliers may also be called upon for information on purchases, supplies or products. Meetings and discussions may be conducted with customers.

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Sedentary	X	Light	Medium	Heavy	Very Heavy
S = Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time		L = Light Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	M = Medium Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	H = Heavy Exerting 50-100 lbs. occasionally, 25-50 lbs. frequently, or up to 10-20 lbs. constantly.	VH = Very Heavy Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

**PHYSICAL DEMANDS:**

C = Continuously 2/3 or more of the time.	F = Frequently From 1/3 to 2/3 of the time.	O = Occasionally Up to 1/3 of the time.	R = Rarely Less than 1 hour per week.	N = Never Never occurs.
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*This is a description of the way the job is currently performed; it does not address the potential for accommodation.*

PHYSICAL DEMANDS	FREQUENCY CODE	DESCRIPTION
Standing	F	Copy machine, fax machine, filing, greeting customers, presentations, document retrieval
Sitting	F	Desk work, computer, accounting, assisting customers
Walking	F	Greeting customers, copy machine, fax machine, printer, inter-office
Lifting	O	Storage boxes, files, large report binders, benefit packages, office supplies
Carrying	O	Storage boxes, files, large report binders, benefit packages, office supplies
Pushing/Pulling	O	File boxes, office furniture, file drawers
Reaching	F	Large report binders, items from shelf above desk or work area
Handling	O	Storage boxes, files, large report binders, benefit packages, office supplies, office equipment
Fine Dexterity	C	Computer keyboard, calculator, typewriter, writing
Kneeling	R	Filing in lower file cabinet drawers, lower shelf retrieval
Crouching	R	Filing in lower file cabinet drawers, lower shelf retrieval
Crawling	N	
Bending	F	Filing in lower file cabinet drawers, lower shelf retrieval
Twisting	F	Filing in lower file cabinet drawers, lower shelf retrieval
Climbing	R	Stairs
Balancing	R	On stairs
Vision	C	Computer, desk work, filing, reading, writing, greeting customers
Hearing	C	Telephone, co-workers, staff, presentations, greeting customers, meetings
Talking	C	Telephone, co-workers, staff, presentations, greeting customers, meetings
Foot Controls	N	
Other (specify)	N	

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Computer, printer, fax machine, copy machine, telephone, calculator, typewriter, paper cutter, general office supplies, electric pencil sharpener, scanner, paper shredder, Standard Microsoft Windows and Office software, PeopleSoft, PowerPluse, Internet, Intranet, Advantage Financial System (AFIN), Laser Fiche, Advantage Desktop, Rightfax, Virginia Ret. System

**ENVIRONMENTAL FACTORS:**

D = Daily	W = Several Times Per Week	M = Several Times Per Month	S = Seasonally	N = Never
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HEALTH AND SAFETY		ENVIRONMENTAL FACTORS	
Mechanical Hazards	N	Dirt and Dust	M
Chemical Hazards	N	Extreme Temperatures	S
Electrical Hazards	N	Noise and Vibration	N
Fire Hazards	N	Fumes and Odors	N
Explosives	N	Wetness/Humidity	N
Communicable Diseases	N	Darkness or Poor Lighting	N
Physical Danger or Abuse	N		
Other (see 1 below)	N		

PRIMARY WORK LOCATION	
Office Environment	X
Warehouse	--
Shop	--
Vehicle	--
Outdoors	--
Other (see 2 below)	--

(1)

(2)

**PROTECTIVE EQUIPMENT REQUIRED:**

None

**NON-PHYSICAL DEMANDS:**

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NON-PHYSICAL DEMANDS	
Time Pressures	F
Emergency Situations	R
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	O
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	F
Noisy/Distracting Environment	O
Other (see 3 below)	N

(3)